

AI Permissions FAQ

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Pipeline AI is off until a master admin turns it on, and each AI action carries its own access setting. Answers to the common questions about who can enable it and who can run it.

Who can turn Pipeline AI on?

Only a master admin. Until they do, *AI Create* and *AI Update* don't appear for anyone in the account.

Can support turn it on for me?

No. Activation sits with your account's master admin by design, and we can't do it on your behalf — even at your request. You'll find your admins under *Admin & Support* in the left menu of your Home page.

Can I let some people use AI but not others?

Yes. Under *Who Can Use AI?* a master admin sets *AI Create* and *AI Update* separately, so you can open one and hold the other.

What do the three access levels mean?

They narrow the pool, in three steps. **Master Admins** is master admins only. **Admins / Staff** adds admins with the *View All Transactions* permission. **Anyone** means anyone who could already do that work by hand.

Do I have to set this up?

No. Both actions start at **Anyone**, so leaving them alone keeps your team's current access unchanged. Narrow them only if you want to.

Can I let my admins use AI while blocking agents?

Yes — set both actions to **Admins / Staff**. That was the request we heard most after launch, and it's what the per-action settings are for.

Could AI let someone open a transaction they otherwise couldn't?

No. These levels narrow access, never widen it. Someone who can't create a transaction by hand can't run *AI Create* whatever you've selected, and *AI Update* still needs access to the transaction and its documents.

Can the people I give AI access see what it costs?

Only master admins can. **AI budget** and **AI usage (current)** show for master admins alone, even to admins running

AI every day.

Can non-admins try Pipeline AI before it's rolled out?

No. The starter credits belong to master admins, so the AI options appear for them first. That's also why a Pipeline AI link in an announcement email errors for everyone else.

I have full access to Pipeline — why can't I use AI?

Full access to Pipeline isn't access to Pipeline AI. It has to be switched on at the account level first, and your role has to be included in the setting for that action.

AI Create or AI Update isn't where you expected it, or a Pipeline AI link from an email returns an error. It's almost always an access gate rather than a fault.

See [Why Can't I See Pipeline AI?](#)

Learn More

Your monthly limit is the ceiling on what Pipeline AI can cost your account — set it once, change it whenever you like, and you're only ever billed for the runs your team actually makes.

See [AI Monthly Limit](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
